

MEMORANDUM FOR THE RECORD

Subj: PERFORM-TO-SERVE (PTS) QUOTA MANAGEMENT PLAN BUSINESS RULES

1. Effective immediately, the following new Perform-to-Serve (PTS) quota management business rules will apply to the monthly PTS quota management plan. PTS quota management business rules dated 09 April 2012 are hereby cancelled.

a. A maximum 13-month expiration date will be assigned to each PTS Quota.

b. Quota utilization:

- Any action that changes a Sailor's Soft Expiration of Active Obligated Service (SEAOS) date constitutes utilization of the PTS Quota. Any future enlistment or continuation action will require a new approved PTS Quota.
- For approved quotas based on SEAOS applications: Any action that changes a Sailor's Expiration of Active Obligated Service (EAOS) prior to quota expiration, such as an existing extension going operative, will not result in the quota being rescinded/loss of PTS Approval.
- For approved quotas based on Special Circumstance applications: Any action that changes a Sailor's EAOS, such as an existing extension going operative, constitutes non-utilization of the approved quota and the quota will be rescinded.

c. Separation Quotas will remain in the PTS System until the Sailor has effected separation or the Sailor is reset by the cognizant Community Manager.

d. Enlisted Community Managers (ECM) are authorized to use the locally developed Quota Management Tool (QMT) for planning and executing PTS quotas. Monthly reporting and approval by N13 will be required.

(1) The overall goal of the QMT is to shape each rating to a manning level between 98% and 102%. As such, ECMs will start with aggregate rating manning as a baseline and use the QMT to target individual zones as well as year groups to determine where action is required in order to keep the aggregate within the 98% - 102% range. The ECM is authorized to compensate undermanning in a zone/year group with an adjacent zone/year group on a one-for-one basis.

(2) If the individual rating aggregate manning is below 98%, the ECM will not exercise any force reductions levers that reduce aggregate inventory for these ratings, unless approved by N13.

(3) If rating aggregate manning is over 102%, the ECM shall determine which zones/year groups are overmanned and take appropriate actions IAW the following guidelines:

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i. If EMC is overmanned in Zones D and/or E but undermanned in Zones A, B, and/or C, the ECM should utilize the QMT to optimize zone health without affecting healthy aggregate manning.

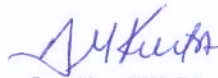
ii. If EMC is undermanned in zones D and/or E but overmanned in zones, A, B, and/or C, the ECM is authorized to adjust zone/year group inventories to bring aggregate EMC manning to a healthy level (98%-102%).

e. ECMs are authorized to phase manning changes over a maximum of three years, including year of execution, in order to respond to changes in Enlisted Programmed Authorizations (EPA.)

f. To provide reenlistment opportunity in every rating, ECMs are authorized to grant PTS quotas to the top performer in each competitive category (rating/ year group), each cycle. The top performer will be determined by the rack and stack algorithm.

g. Sailors selected for advancement via NWAEC cycles must participate in standard PTS competition for quota approval. Sailors who have exhausted their PTS looks, but are then selected for advancement, will be reset upon request to grant one additional PTS look at the frocked paygrade.

2. All stakeholders will continue to closely monitor the PTS Quota Management Plan on a monthly basis to ensure community health, while staying within end strength controls.



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